



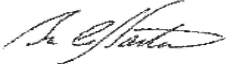
STATE OF INDIANA

AN EQUAL OPPORTUNITY EMPLOYER

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TO: All Local Unit Officials

FROM: Bruce Hartman, State Examiner 

RE: New Gateway Annual Report to be Implemented January 2012

DATE: August 1, 2011

The State Board of Accounts (SBoA) is on pace to implement a new Web-Based Annual Report January 2012 for the 2011 reporting period. The new Annual Report is being implemented as part of the Indiana Gateway for Government Units (Gateway) in cooperation with the Department of Local Government Finance (DLGF) and the Indiana Business Research Center (IBRC) at the Indiana University Kelley School of Business.

The Gateway modernizes the way local government units submit financial information to the State. With this electronic data, the State can provide local government units, as well as citizens, user-friendly reports and research tools which will dramatically increase the transparency and accessibility of local government financial information.

The Gateway will consist of two subsystems, Budget Submission (DLGF) and the Annual Report (SBoA). DLGF has already implemented the Budget portion of the Gateway to allow Units to submit their 2012 Budget. If you haven't already done so, you will need to contact DLGF to obtain access to the Gateway so you can start the Budget submission process. Send your name, email address, unit name, and county to gateway@dlgf.in.gov. Please note that you will use the same account (User ID/password) to access the Annual Report part of the Gateway.

There are some Units that do not submit budgets to DLGF. If you are such a Unit, you will need to have an account setup to submit your Annual Report. Please send your name, title, email address, unit name, and county to annualreport@sboa.in.gov. See also the User Account document at <http://www.in.gov/sboa/3700.htm>.

The Annual Report will use similar user access rights (Submission, Edit, and Review) as the Budget portion of the system. Please note that there will be only one User per Unit that will have Submission rights. Submission rights will only be assigned to the Responsible Official at the Unit. User access for the Annual Report will be initially set to the same access as the Budget. If you want to change Users and/or access for the Annual Report please send a SBoA Limited Delegation of Authority form to annualreport@sboa.in.gov. For additional details on user accounts, rights, and the SBoA Limited Delegation of Authority form see <http://www.in.gov/sboa/3700.htm>.

As part of the implementation, SBoA is in the process of creating a training plan. In an attempt to accommodate varied computer skills, schedules, and personal learning preferences, training will be available in multiple formats such as an on-line video, presentations at conferences, and instructor lead hands-on workshops. We will also publish a user guide. Please watch for more details in future communications and on our web site.

In lieu of manual data entry, the Gateway Annual Report will allow certain data to be uploaded via files generated by the Unit's computerized financial system. The data includes Beginning Balances by Fund (both cash and investments) and Detailed Receipts/Disbursements by Fund. Detail file formats and specifications regarding the upload process can be found on our web site at <http://www.in.gov/sboa/3700.htm>. Please be aware that the file formats and specifications for the Gateway Annual Report are different than the previous Annual Report upload process. As a result, if you used the upload process in previous years, your vendor will have to modify their process to generate the upload files. We have notified, in a separate letter, the vendors that had an upload process for the previous Annual Report. If you aren't sure that your vendor previously had an upload process or if you want your vendor to develop one, we have included a copy of the letter that you can send to your vendor.